Clintel
CareRight Mail Management Manual

Gen 4

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What is Mail Management?

The Mail Management system:

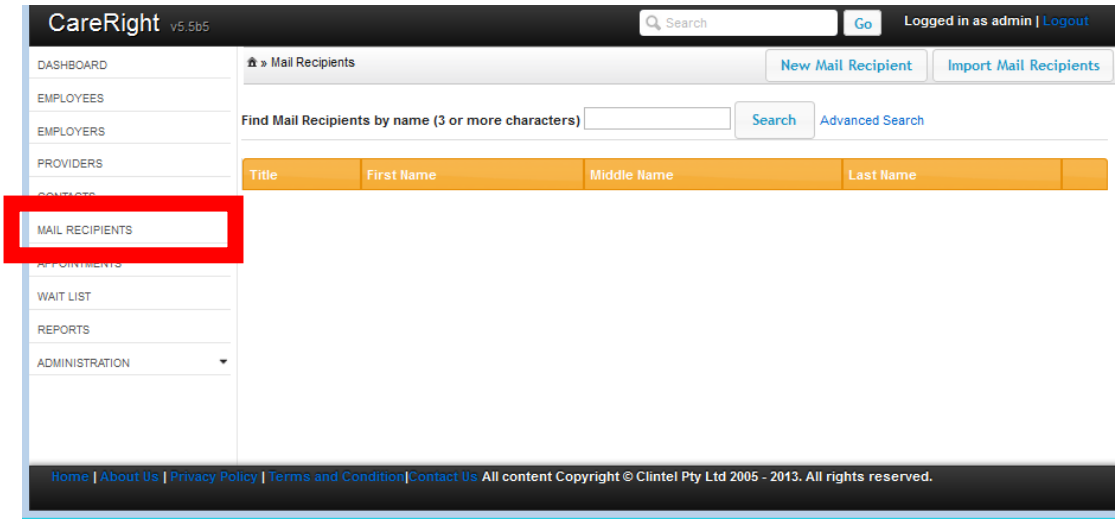
- Allows you to maintain a list of people
- Provides a way of categorising a person using one or more tags

There are three types of people in the mail management system:

1. **Mail recipients** – these appear only in the Mail Management system and no-where else in CareRight. These peoples' records are kept up to date in the mail management system.
2. **Contacts** – the Mail Management system gives you access to anyone that is in your Contacts module. These are potential clients that have not been converted into clients.
3. **Clients** – you also have access to all clients in CareRight.

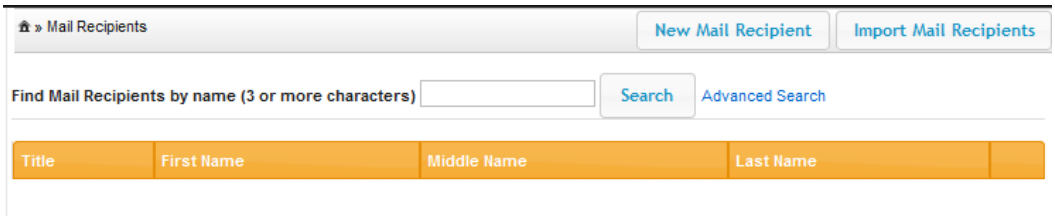
Getting to Mail Management

From CareRight, click the **Mail Recipients tab**

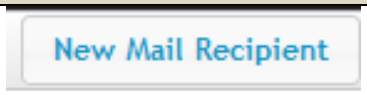
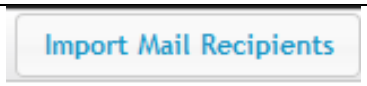
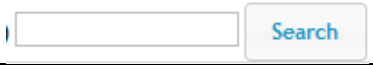


The Mail Management Home Page

When you click the Mail Recipients tab you will be taken to the Mail Management home page.

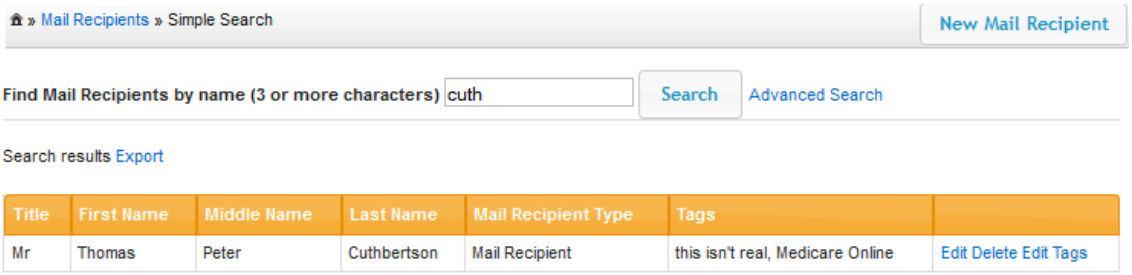


A description of what each of these buttons/links does it below.

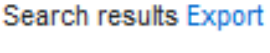
Button/ link	Description
	Add a new Mail Recipient
	Import a list of mail recipients into the system
	Search using name or reference
	Perform an advanced search

Simple Search results screen

If you perform a simple search that produces results, you will see the following page.



A description of what each of these buttons/links does it below.

Button/ link	Description
	Export Search results to CSV file
	Edit the Mail Recipient. This option is only available for Mail Recipients, not Contacts or Clients.
	Delete the Mail Recipient permanently. This option is only available for Mail Recipients, not Contacts or Clients.
	Edit the tags associated with the person.

Tags

What are Tags?

Tags act as groups and help categorise your Mail Recipients. For example, if your marketing strategy differed for men and women, you may have two tags:

- Female
- Male

All your female Mail Recipients would have the "Female" tag assigned to them.
All your male Mail Recipients would have the "Male" tag assigned to them.

You could then use this tag as a search criteria and export a list of men and women separately.

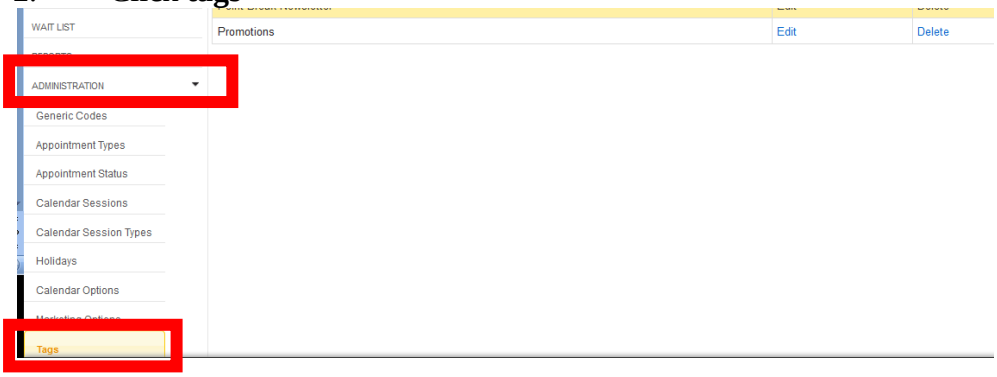
A Mail Recipients can have multiple tags assigned to them.

Please note: Admin rights are needed to add / edit / delete a tag.

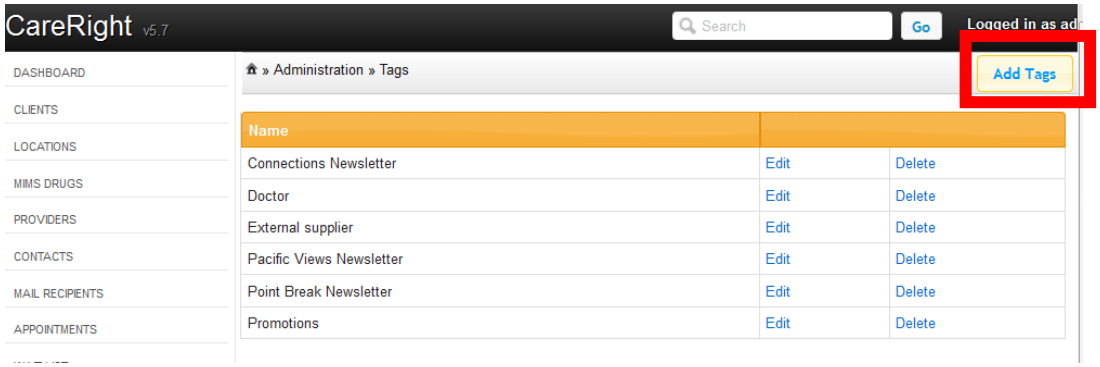
Add a tag

To add a tag:

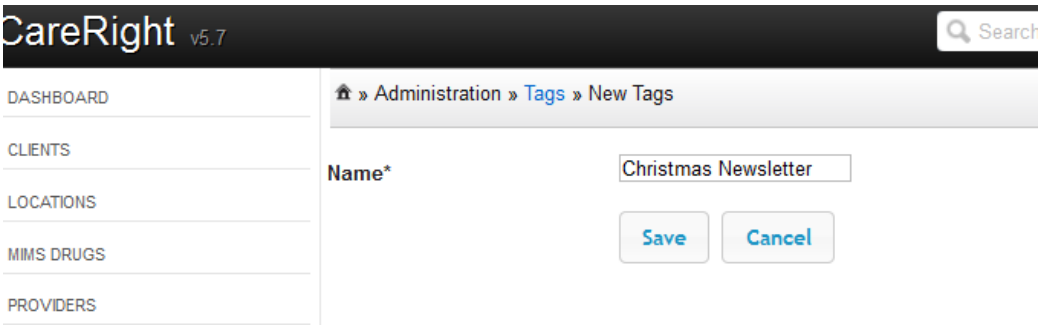
1. Click the **Adminsitration** tab
2. Click **tags**



3. If the tag you wish to add is not in the list, click the **Add Tags** button



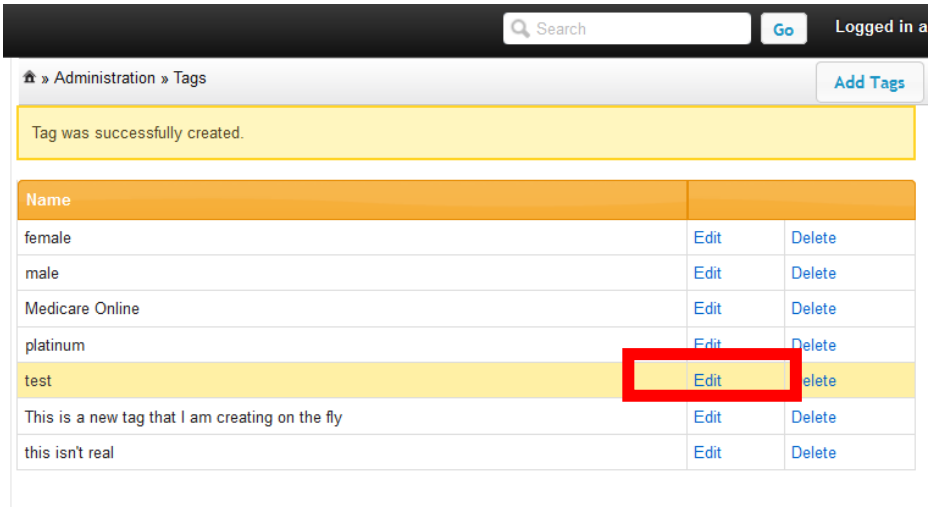
4. Type the **Name** of the new tag
5. Click Save



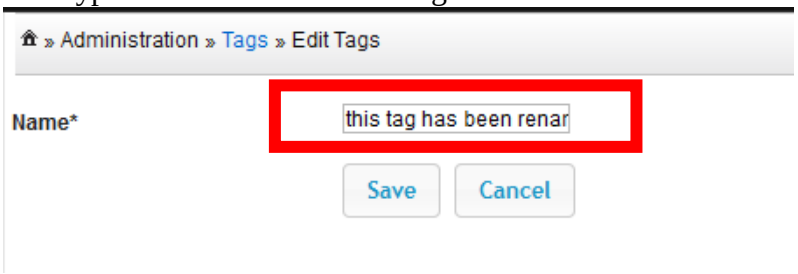
Change the name of a tag

To change the name of a tag:

1. Click the **Adminsitration** tab
2. Click **tags**
3. Find the tag you wish to edit and click the **edit** link



4. Type the new name for the tag into the **name** field.



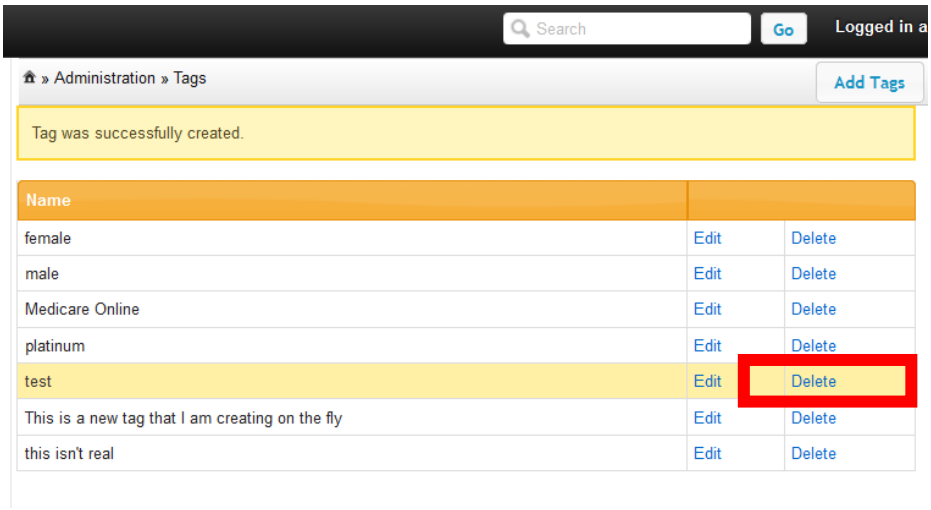
5. Click Save

Deleting a tag

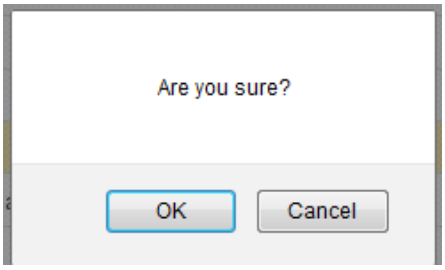
If you add a tag in error, you can delete it, as long as it has not been used.

To delete a tag:

1. Click the **Adminsitration** tab
2. Click **tags**
3. Find the tag you wish to delete and click the **delete** link

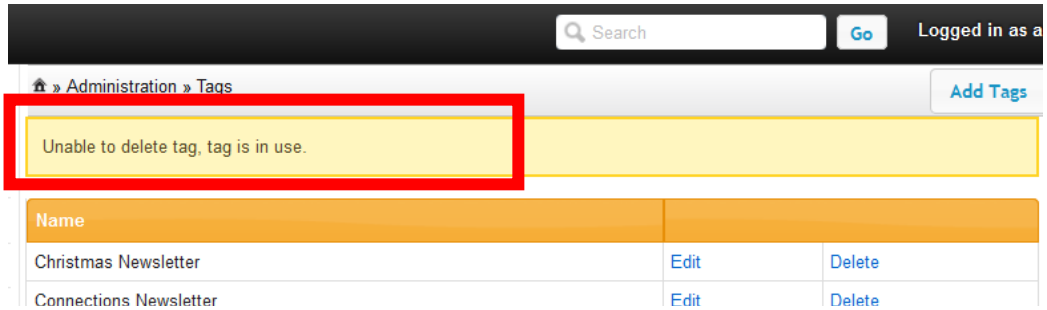


4. To confirm deletion, click OK to the confirmation message



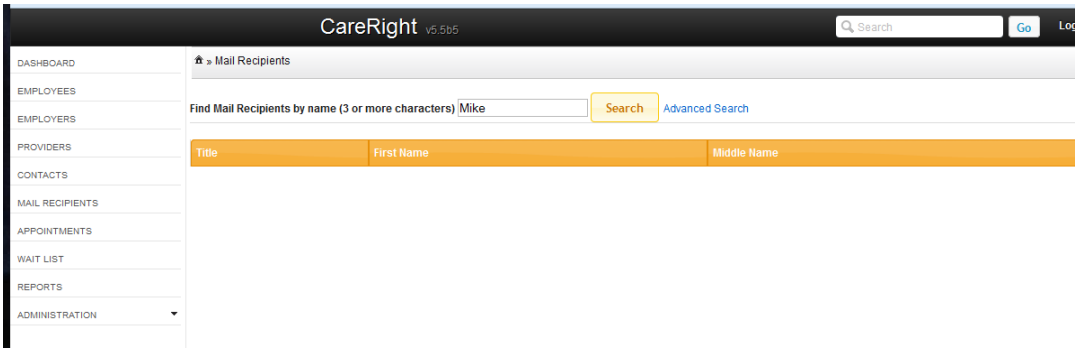
Deleting a tag that is in use

You cannot delete a tag that is in use. If you try you'll get the following error message.

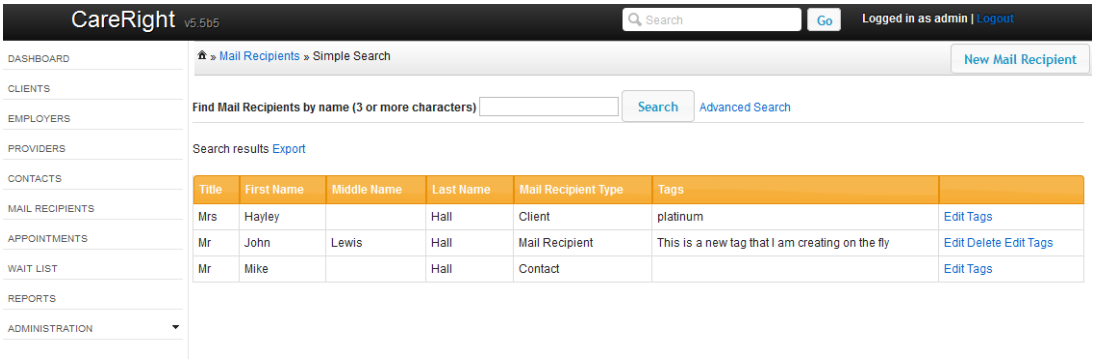


Using the Simple Search

1. Click the **Mail Recipients** link
2. Type at least **3 characters** of the **first name**, **surname** or **reference** of the person you wish to find:



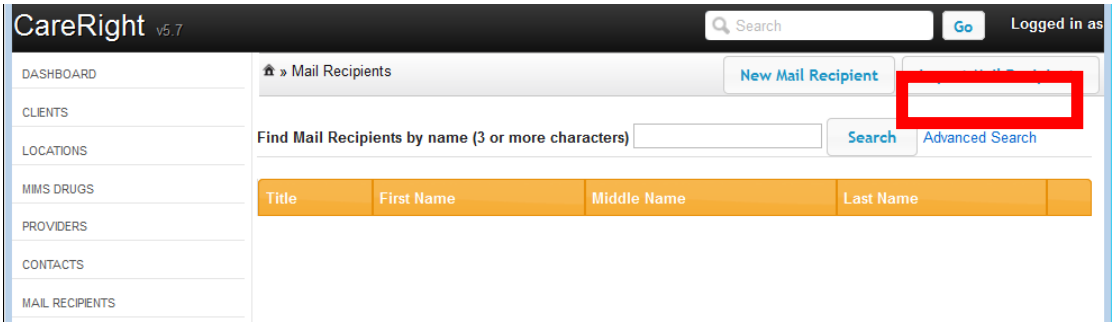
3. Results are displayed below:


CareRight v5.5b5
Search
Go
Logged in as admin | Logout
DASHBOARD
CLIENTS
EMPLOYERS
PROVIDERS
CONTACTS
MAIL RECIPIENTS
APPOINTMENTS
WAIT LIST
REPORTS
ADMINISTRATION
» Mail Recipients » Simple Search
New Mail Recipient
Find Mail Recipients by name (3 or more characters)
Search
Advanced Search
Search results Export
Title | First Name | Middle Name | Last Name | Mail Recipient Type | Tags
Mrs | Hayley | | Hall | Client | platinum | Edit Tags
Mr | John | Lewis | Hall | Mail Recipient | This is a new tag that I am creating on the fly | Edit Delete Edit Tags
Mr | Mike | | Hall | Contact | | Edit Tags

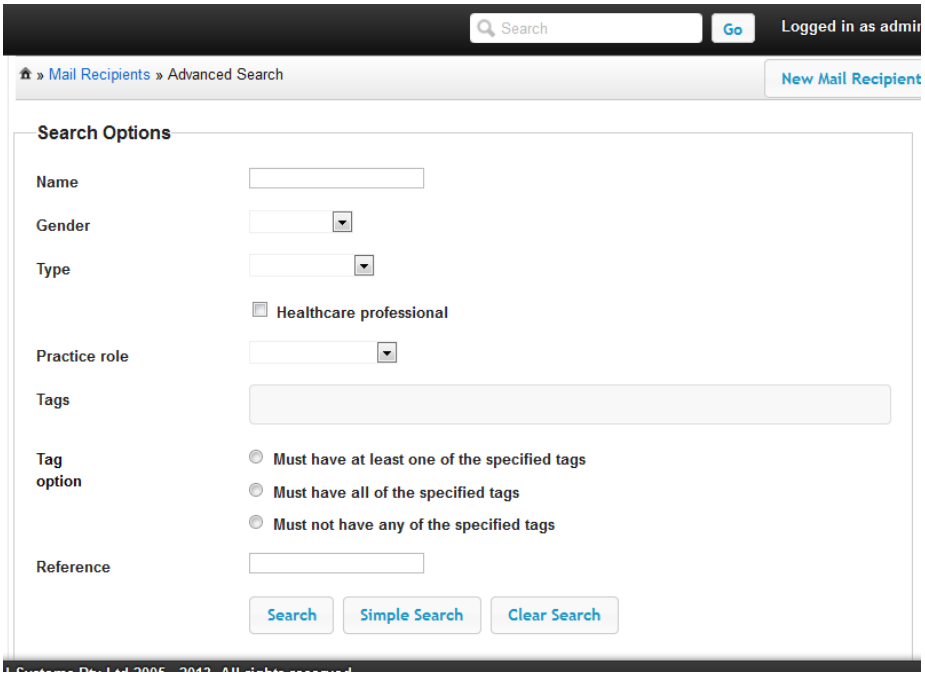
4. Actions available will be dependent on the Mail Recipient Type:
    a. **Mail recipients** – you can edit the Mail Recipient's record, delete them, edit tags.
    b. **Contacts** – you can edit tags for this Contact.
    c. **Clients** – you can edit tags for this Client.

Using Advanced Search

1. Click the **Mail Recipients** link
2. Click **Advanced Search**



3. You can now search using the different fields:

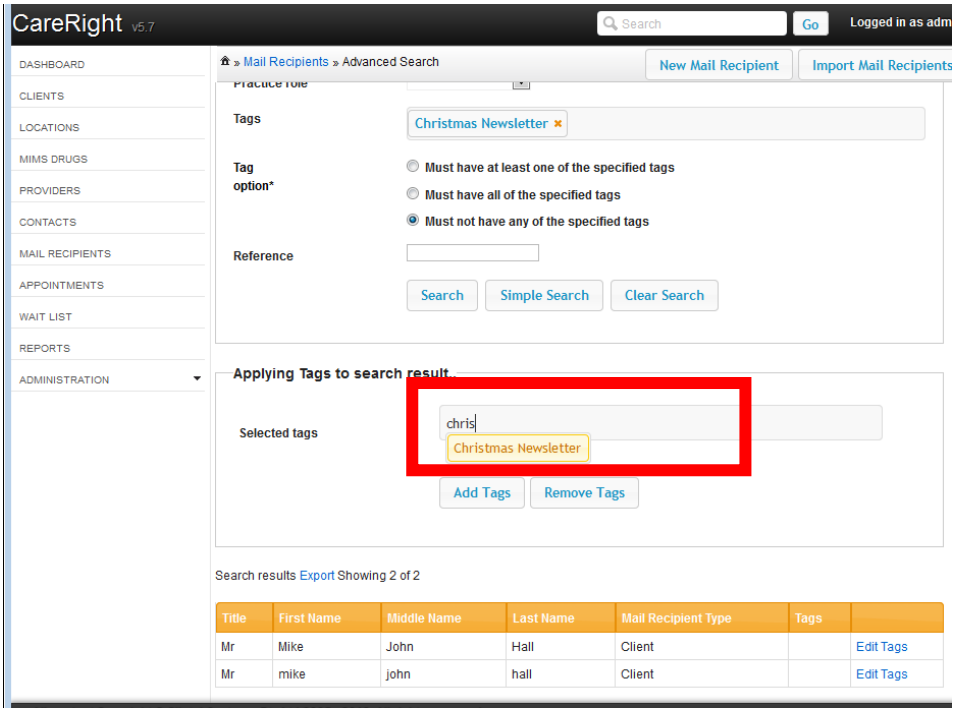


Field	Description	Example
Name	Include people with a particular first or last name	*Mike, Hall*
Gender	Include people of a particular gender	*Male, Female*
Type	Include only Mail Recipients, Contacts or Clients in the search results	*Mail Recipient, Contact or Client.*
Healthcare professional	Include Healthcare Professionals in the in the search results	*Tick = include* *Unticked = don't include*
Practice role	Include people with a specific practice role	*Doctor, Practice Manager*
Tags	List any tags here… then use **Tag option**..	
Tag Option	This allows you to include or exclude tags in the Tags field	
Reference	Include people with the Mail Recipient reference number matching this value	*mhall1981*

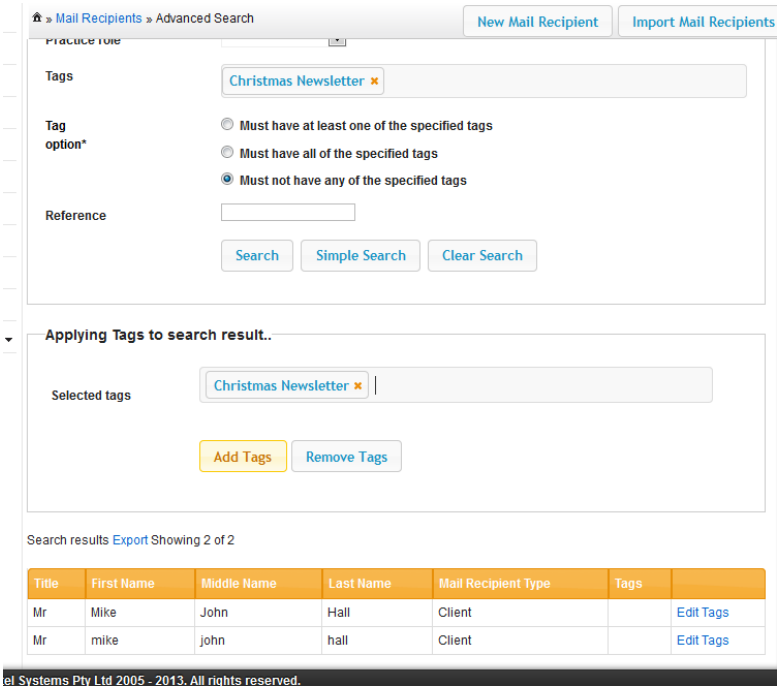
Multiple Tag Assignment

When you have performed an advanced search, you can apply or remove tags to multiple people.

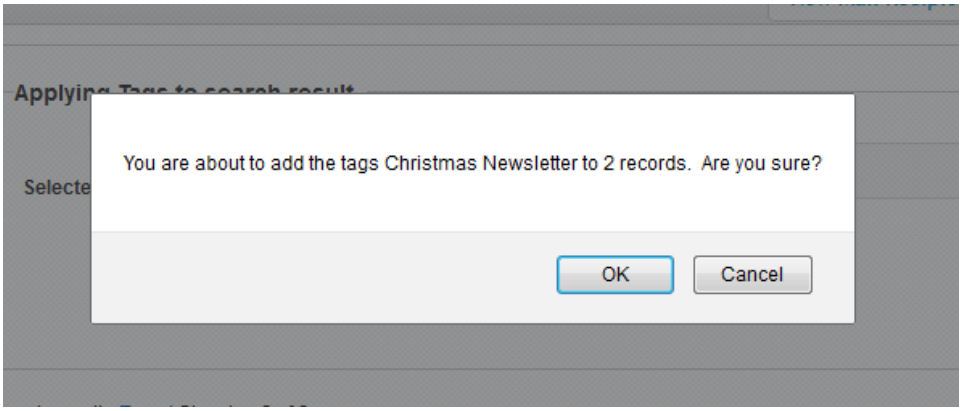
1. Type the tag name into the **Selected tags** box and click to select the tag. You can add more than one tag.



2. Click the Add Tags button. This will apply to tag to all the people in the results list below.



3. You will see a message asking you to confirm the action – click OK:



To remove tags from a person's record, follow the process above and use the **Remove Tags** button.

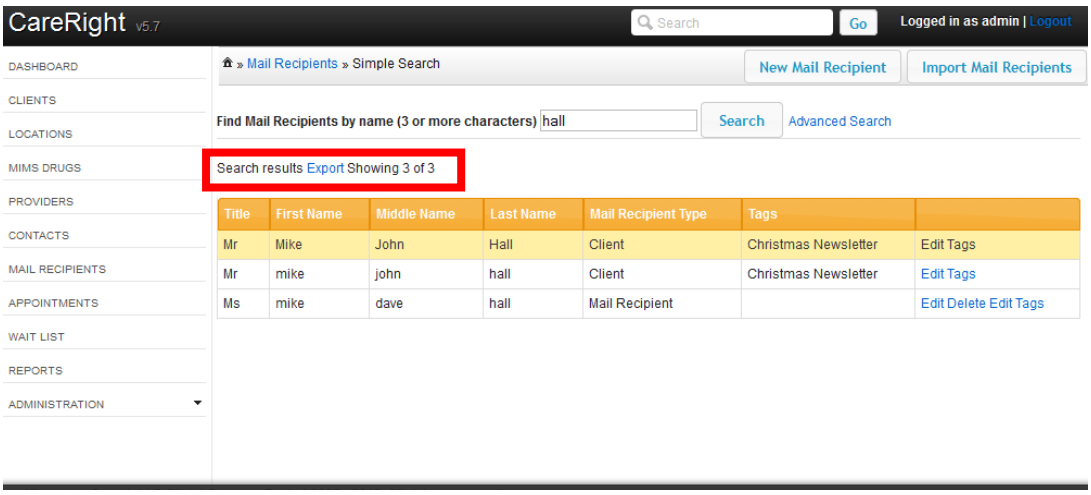
Exporting a list of Mail Recipients

You can export a list of selected Mail recipients in CSV format.
There are two ways to do this.

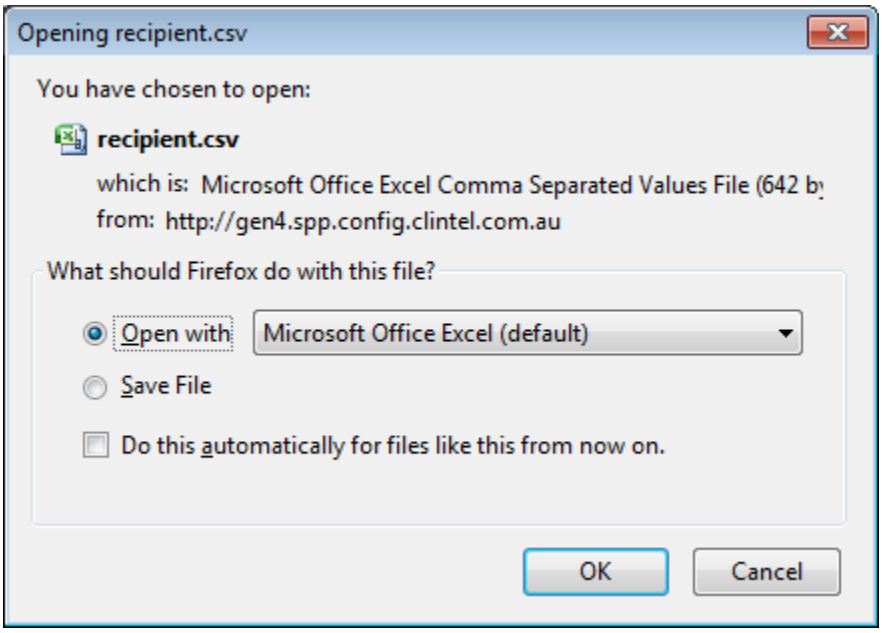
Exporting using the Simple Search results

Use this method if you want to export a list of people based on name or reference.

1. Perform a simple search (click Mail Recipients > Enter a name or reference into the search box > click search)
2. Click the Export link



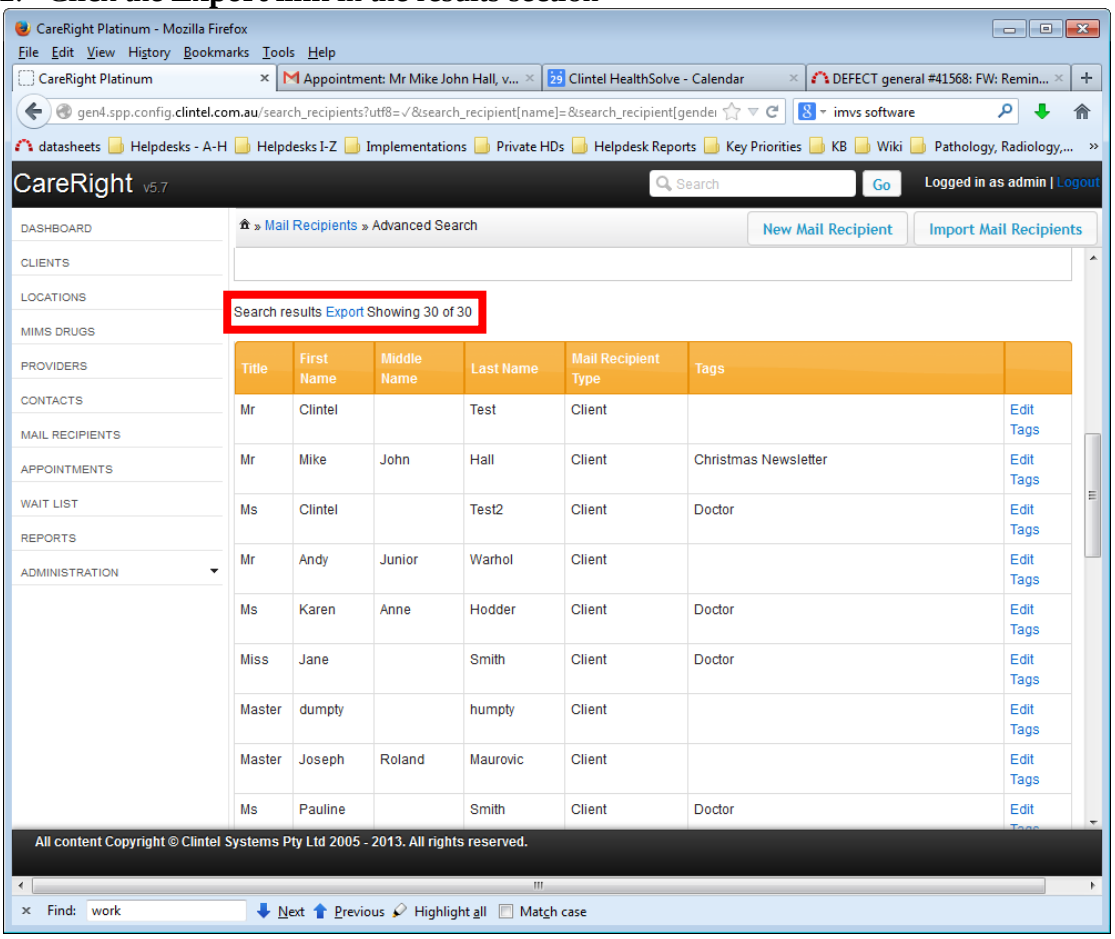
3. Depending on your browser settings, you can either download or open the csv export. You can then use this file for a mail merge or upload it to a third party mail out website such as Constant Contact or Mail chimp.


Opening recipient.csv
You have chosen to open:
recipient.csv
which is: Microsoft Office Excel Comma Separated Values File (642 b
from: http://gen4.spp.config.clintel.com.au
What should Firefox do with this file?
Open with
Microsoft Office Excel (default)
Save File
Do this automatically for files like this from now on.
OK
Cancel

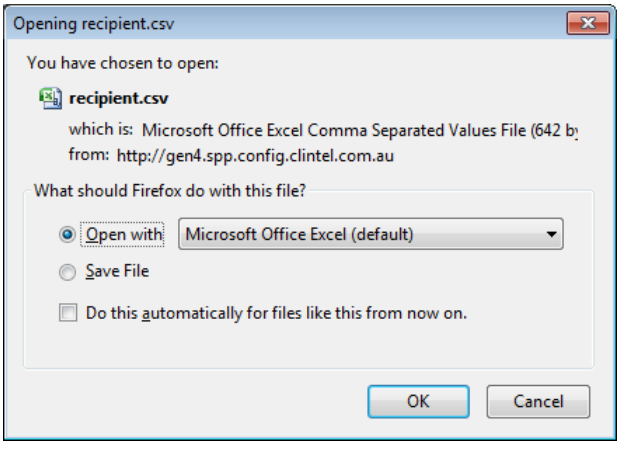
Exporting using the Advanced Search results

Use this method if you want to export a list of people based on tag or more advanced criteria.

1. Perform an Advanced Search
2. Click the **Export link** in the results section


CareRight Platinum - Mozilla Firefox
CareRight v5.7
Logged in as admin | Logout
DASHBOARD
CLIENTS
LOCATIONS
MIMS DRUGS
PROVIDERS
CONTACTS
MAIL RECIPIENTS
APPOINTMENTS
WAIT LIST
REPORTS
ADMINISTRATION
» Mail Recipients » Advanced Search
New Mail Recipient
Import Mail Recipients
Search results Export Showing 30 of 30
Title | First Name | Middle Name | Last Name | Mail Recipient Type | Tags
Mr | Clintel | | Test | Client | | Edit Tags
Mr | Mike | John | Hall | Client | Christmas Newsletter | Edit Tags
Ms | Clintel | | Test2 | Client | Doctor | Edit Tags
Mr | Andy | Junior | Warhol | Client | | Edit Tags
Ms | Karen | Anne | Hodder | Client | Doctor | Edit Tags
Miss | Jane | | Smith | Client | Doctor | Edit Tags
Master | dumpty | | humpty | Client | | Edit Tags
Master | Joseph | Roland | Maurovic | Client | | Edit Tags
Ms | Pauline | | Smith | Client | Doctor | Edit
All content Copyright © Clintel Systems Pty Ltd 2005 - 2013. All rights reserved.
Find: work
Next
Previous
Highlight all
Match case

4. Depending on your browser settings, you can either download or open the csv export. You can then use this file for a mail merge or upload it to a third party mail out website such as Constant Contact or Mail chimp.


Opening recipient.csv
You have chosen to open:
recipient.csv
which is: Microsoft Office Excel Comma Separated Values File (642 b
from: http://gen4.spp.config.clintel.com.au
What should Firefox do with this file?
Open with
Microsoft Office Excel (default)
Save File
Do this automatically for files like this from now on.
OK
Cancel

Which fields are exported?

The following fields are exported:

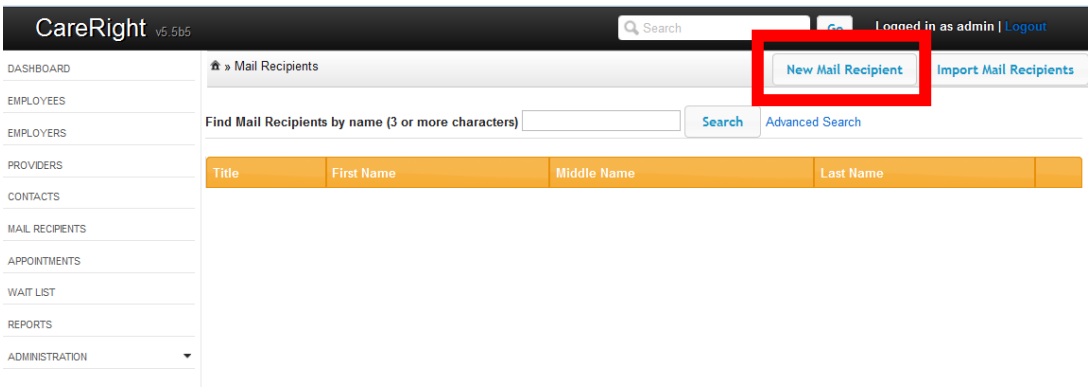
1. title
2. first_name
3. middle_name
4. last_name
5. postal_address1
6. postal_address2
7. postal_suburb
8. postal_post_code
9. postal_state
10. postal_country
11. postal_phone
12. postal_fax
13. postal_mobile
14. postal_email
15. dob
16. gender
17. tags
18. reference
19. notes
20. healthcare_professional
21. practice_name
22. role
23. email_consent
24. postal_consent

Creating a Mail Recipient

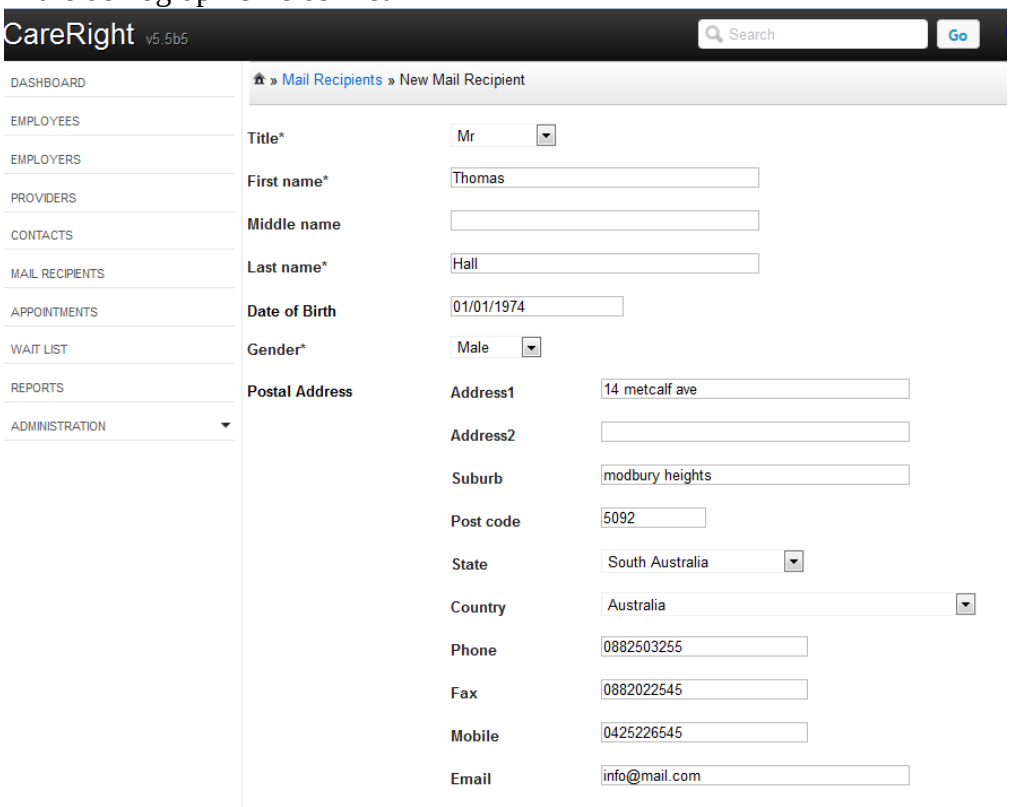
If after searching for the Mail Recipient you don't see the person you are looking for, you can create a new entry.

To do this:

1. Click the Mail Recipients tab
2. Click the New Mail Recipients button



3. Fill in the demographic fields first



Then fill in the following fields

a. **Reference**: This is a reference that you can assign to a Mail Recipient which is searchable. You can leave this blank.

b. **Tag List**: Add tags that describe the groups that the Mail Recipient is a member of
c. **Note**: Any notes that are relevant for this Mail Recipient

Reference
Tag list
Note
Save
Cancel
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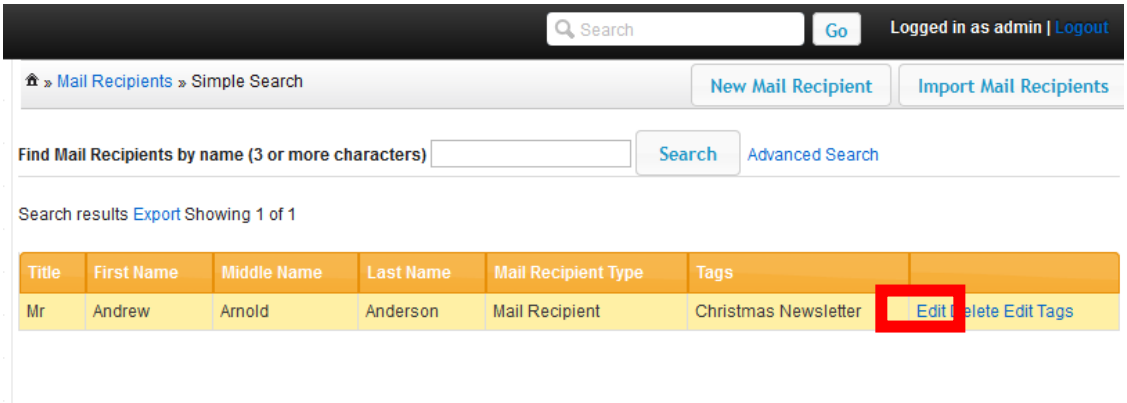
4. Click **save**

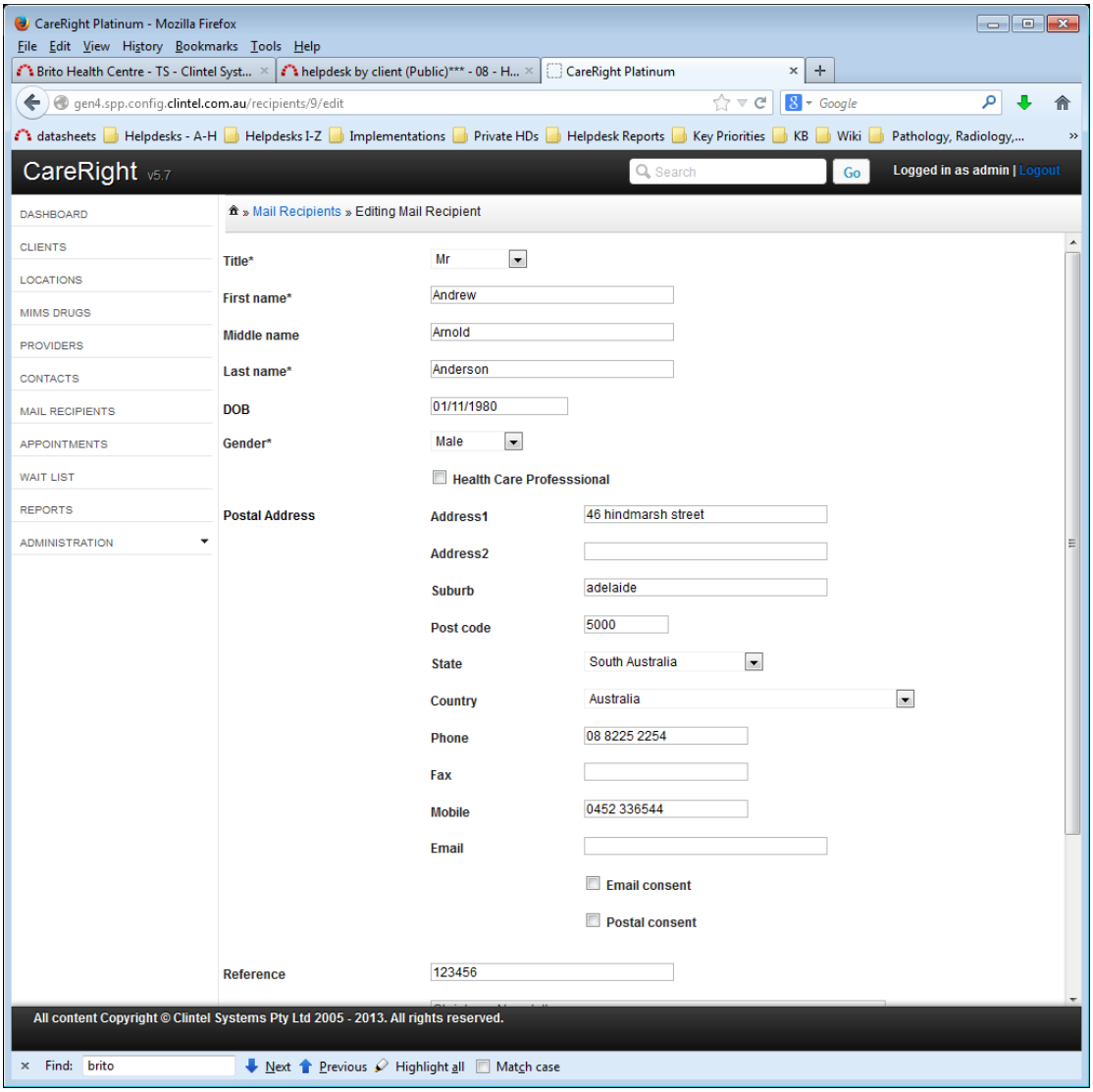
Editing a Mail Recipient

You can only edit Mail Recipients – Contacts and Clients need to be editting in their respective areas of Careright.

1. To Edit a Mail Recipient simply click the edit link on the right of the Recipient name.



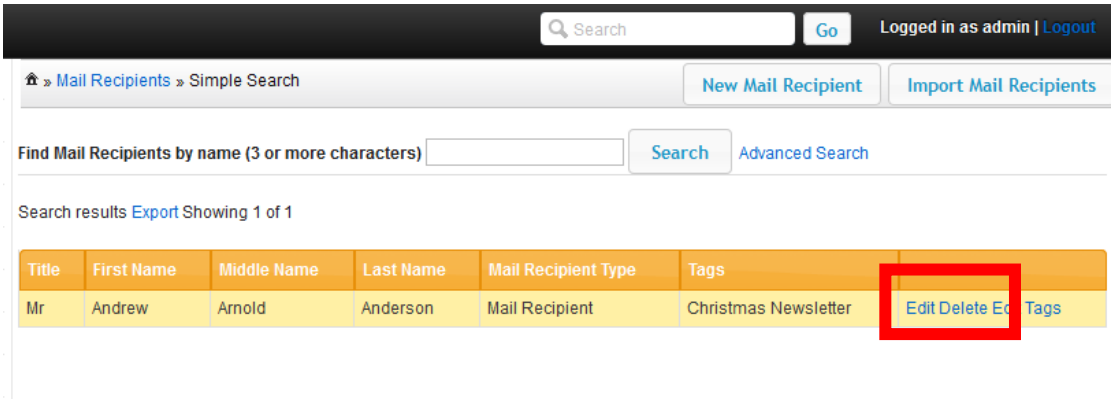
3. This will open up the Edit window



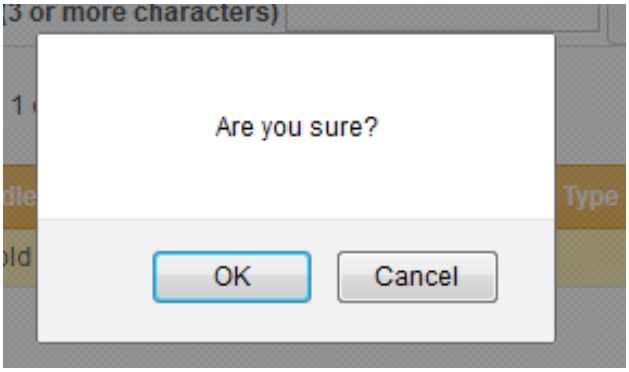
4. When you have finished click **Save**

Deleting a Mail Recipient

1. Search for the recipient
2. Click delete



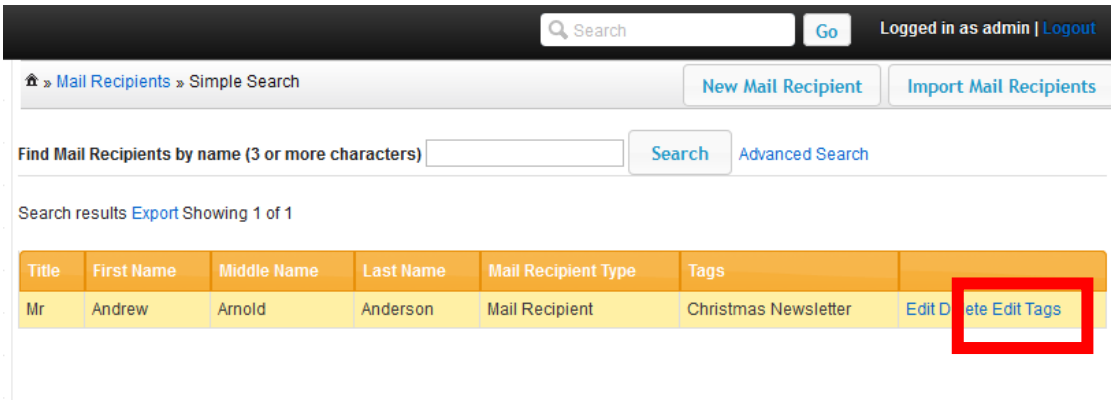
3. Click **OK**



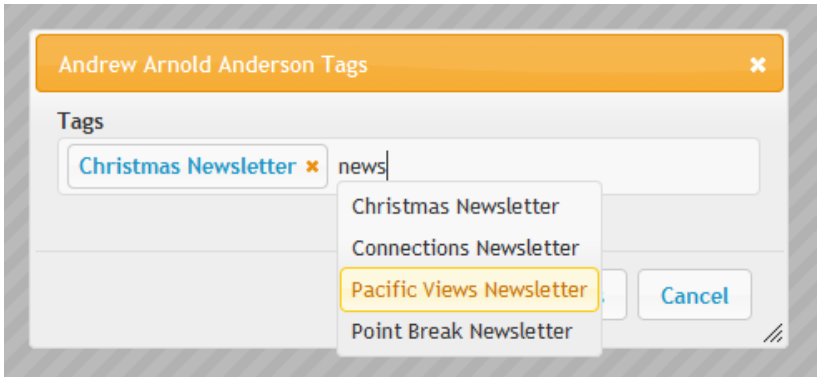
This will **permanently** remove the Mail Recipient.

Adding and removing tags from an individual record

1. To add or remove a tag, search for the person and click Edit Tags



2. Type the name of the tag and select it from the drop down Or use the orange cross to remove any tags already applied.



3. When you are finished, click **Apply Tags**.

Importing Mail Recipients

The system allows you to import a list of mail recipients.
These will be stored as Mail recipients in CareRight.

CSV File Format

You should upload a CSV file that contains the 19 columns shown below. It should contain a header row (i.e. row 2 should be the first Mail Recipient):

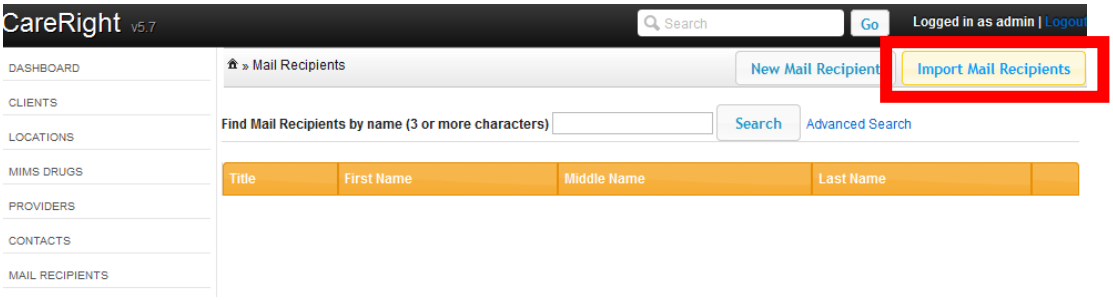
Column Order	Field title	Format
1	Title	
2	First Name	
3	Middle Name	
4	Last Name	
5	DOB	YYYY-MM-DD format, or Excel Australian date format: DD/MM/YYYY
6	Gender	
7	Postal Address1	
8	Postal Address2	
9	Postal Suburb	
10	Postal Post Code	
11	Postal State	
12	Postal Country	
13	Mobile	
14	Email	
15	Phone	
16	Fax	
17	Tags	A list of tags to apply, separated by ; (semicolons)
18	Reference	
19	Notes	

A few basic rules are:

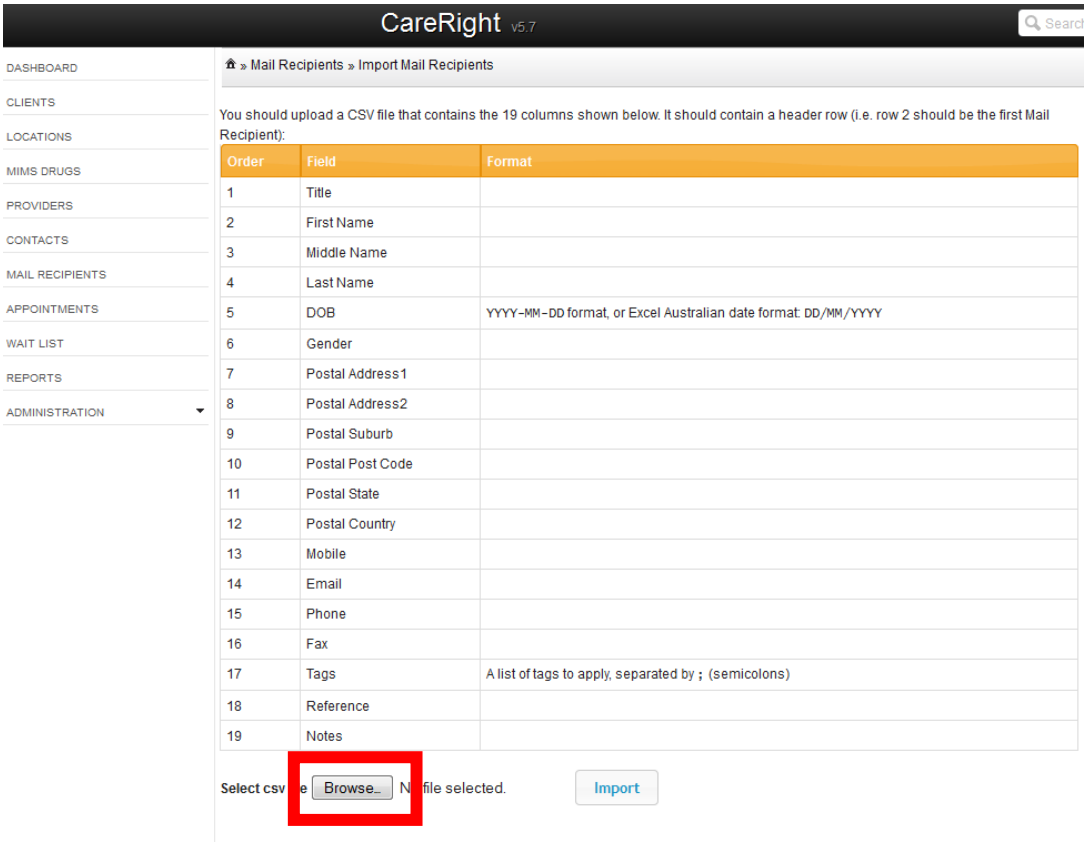
- The header names in the CSV must match exactly the header names above
- You cannot list new tags in the CSV 'Tags' field – these will cause an error

Importing the CSV file

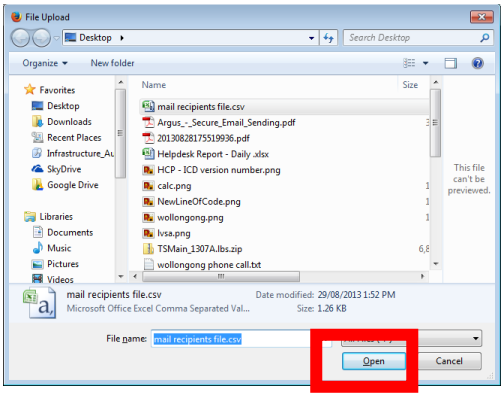
1. Click the Import Mail Recipients button



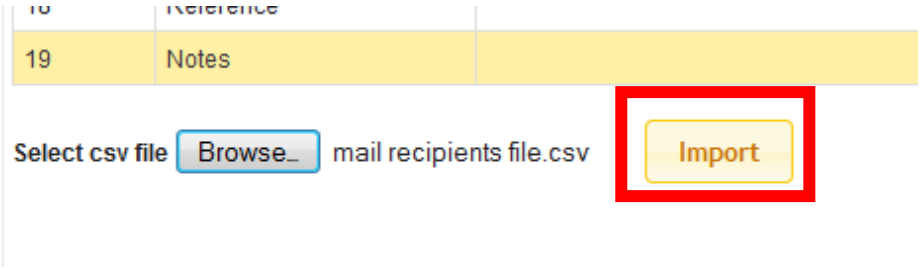
2. Scroll down the page and click Browse to select the CSV file you wish to import.



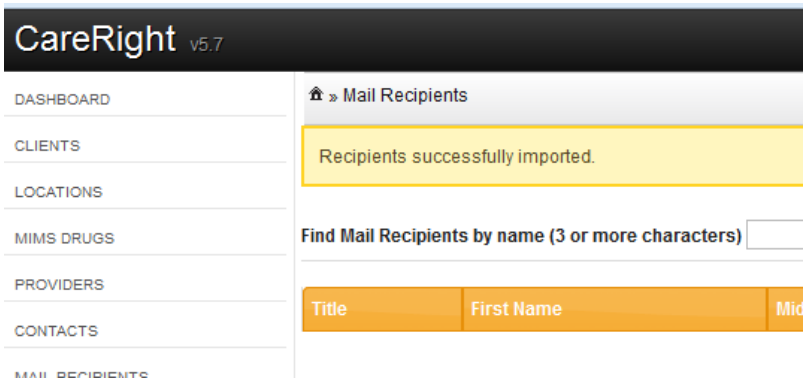
3. Navigate **t**o the file you wish to upload and click Open



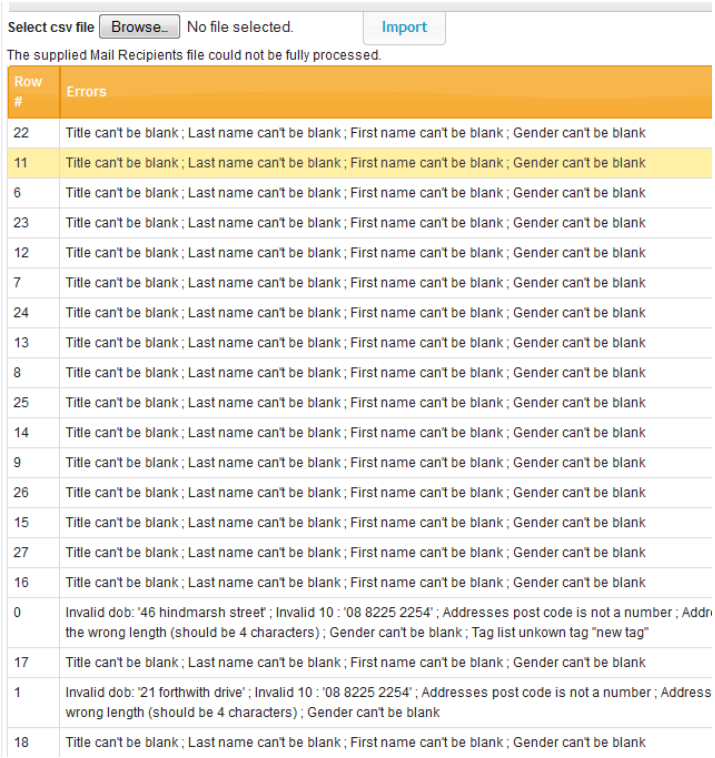
4. Next click the **Import button**



5. If the headers were in the correct order and no errors, then the records will be imported.



6. If there were any errors, the details will be displayed and you will need to fix these up and re-import the rows that were erroneous. See below for an example:


Select csv file
Browse...
No file selected.
Import
The supplied Mail Recipients file could not be fully processed.
Row #
Errors
22 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
11 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
6 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
23 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
12 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
7 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
24 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
13 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
8 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
25 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
14 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
9 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
26 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
15 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
27 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
16 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
0 Invalid dob: '46 hindmarsh street' ; Invalid 10 : '08 8225 2254' ; Addresses post code is not a number ; Addr
the wrong length (should be 4 characters) ; Gender can't be blank ; Tag list unkown tag "new tag"
17 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank
1 Invalid dob: '21 forthwith drive' ; Invalid 10 : '08 8225 2254' ; Addresses post code is not a number ; Address
wrong length (should be 4 characters) ; Gender can't be blank
18 Title can't be blank ; Last name can't be blank ; First name can't be blank ; Gender can't be blank

Please note that rows without errors will be imported successfully, so you will need to fix these up and re-import the rows that were erroneous.